

Napa Valley Waldorf School Initiative - Proposal Abstract
Napa Unified School District – CDS #28 66266 0000000

The Napa Valley Waldorf School Initiative (NVWSI) is a non-profit organization consisting of educators, parents and members of the community at large who are committed to bringing the balance and excellence of Waldorf Education to the Napa Valley. Our goal is to build a foundation on which to establish and nurture a Waldorf Methods Charter School from kindergarten through high school. In September 2000, we plan to begin with a kindergarten and a first grade; then add a consecutive grade each year thereafter. The NVWSI is requesting a planning grant to create and plan a Waldorf Methods Charter School in cooperation with Napa Valley Unified School District.

This planning grant proposal is based on the belief that a Waldorf Methods Charter School will provide for expanded educational opportunities and choices for teachers, parents, and children. We will open the opportunity for administrators, educators, and community members to participate in a Waldorf Methods Charter School structure as a method to accomplish the following:

- Improve student learning by using as our guide a developmental model asserting that children have identifiable stages of development and that learning readiness is based upon those stages of development and appropriate environmental stimulus.
- Increase learning opportunities for all children by using an experiential model based on a curriculum designed to combine student interest and needs, fostering attitudes and habits that promote responsibility and confidence.
- Provide both parents and children with educational opportunities that are not available within a public school system, thereby increasing parental commitment and involvement in their child's education.
- Welcome the general public to ongoing forums on Waldorf education and school festivals and artistic programs.
- Be non-sectarian in the programs, admission policies, employment practices, and all other operations; not charge tuition, discriminate against any pupil on the basis of ethnicity, national origin, gender, or disability and admit all children who wish to attend the school, pending space availability.

This will be accomplished by working with the Napa Valley Unified School District to become a Waldorf Methods Charter School. Parents and students will enroll in this Charter School for a variety of reasons that will include, but are not limited to:

- Seeking an alternative educational experience for their children while remaining in the public school system.

- Providing alternative education without the cost of a private school, but yielding high academic excellence.
- Acknowledging that a child's academic needs, whether it be for a more challenging curriculum, a slower paced curriculum, or a more integrated curriculum, can best be met through an individualized or alternative educational plan.
- Meeting individual social and emotional needs of the student.

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I. Napa Valley Waldorf School Initiative's Educational Vision

A. Baseline Information

Demographic and performance

The proposed Charter School student population will be representative of the Napa Valley Unified School District in ethnic diversity, socio-economic status and academic capability. The NVUSD current enrollment is 67% Caucasian, 1.8% African American, 6.5% Hispanic American and 25% other. The proposed charter school also seeks to enroll many of those families who currently choose the alternative of home schooling and independent study, a minimum of 128 families. [Note: There is a high rate of unreported cases of home study in the Napa Valley according to the Napa Superintendent of Schools.]

Characteristics of the community

The proposed charter school is intended to be centrally located in the Napa Valley, preferably in North Napa or Yountville depending on site availability. The Napa Valley is composed of several rural communities including: American Canyon, Napa, Yountville, Oakville, Rutherford, St. Helena, and Calistoga. The total population is approximately 120,000 people covering approximately 245 sq. miles.

The Napa Valley is a unique micro region that has a wide range of diversity in its populace as well as in its income. There are two main industries that employ residents: 1) agriculture and winery operations, and 2) tourism. Each of these businesses rely heavily upon the other and there are many types of businesses that service and supply products to these industries. As employment opportunities vary within these businesses, there is much diversity of income. The median income in Napa County is \$44,000 for a family of four. A Waldorf Methods Charter School would allow student participation from a diverse ethnic and economic background.

Because of its beauty, agricultural setting, and small community feeling, the Napa Valley has become a very desirable place to live and raise a family. Consequently, there is an influx of new residents which results in a shortage of classrooms and crowded conditions.

B. Educational Vision

Our goal is to enable each child's potential to unfold within a unique and natural educational environment. By developing creative and imaginative capacities within the child, we build a strong academic foundation in a safe and nurturing environment. Waldorf Education develops a love of lifelong learning and lifelong creativity in young people by cultivating:

- Inner enthusiasm for learning and creating;
- Rigorous, clear thinking;
- Respect and appreciation for the world;
- Natural and experiential discovery;

- Initiative and responsibility;
- Awareness of the arts and music.

In the early primary years, youngsters will be guided in a nurturing environment fostering their need for daily reverence, rhythm, and respect. Then, year by year the curriculum will expand with the maturing child, matching themes that mirror the children's inner development with skills, knowledge, and modes of expression appropriate to their age. We will begin as a small program that will grow through the grades and expand with population growth.

Program goals

A Waldorf –Methods education – “nurtures the whole child” by protecting the childhood of the children it serves, avoiding premature demands. Students and teacher move together through the grades as a class. This demands that subject matter be alive and speak to the child's age appropriate experience. We embrace the Waldorf Methods pedagogical model of the child that stresses natural developmental rhythms. Within this framework, the teachers select and present subject matter using approaches tailored to the learning needs of each child . The goals of this Waldorf based approach are:

- Emphasize the whole child while framing academic components within an artistic, creative and imaginative context;
- Staff the school with teachers who have credentials, either Waldorf-trained or knowledgeable enough about the “model of the child” to successfully teach the curriculum;
- Realize that each child is an individual unfolding in a unique way;
- Require personal and professional development of teachers and staff;
- Outline specific expectations for achievement for each grade, and provide parents with oral assessment and written assessment, goal-setting, conferences, performance and portfolio evenings;
- Evaluate curriculum and teachers annually to assure both are aligned with the school vision and mission;
- Include multi-cultural content in the curriculum;
- Welcome children and families of all ethnic origins, religions and beliefs;
- Introduce children to music and the arts.

Although we will open a Waldorf Methods kindergarten and first grade in September, 2000, specific grade curriculum follows through high school. A grade will be added each year as the children in each class grow.

Primary Grades 1 – 3

- Pictorial introduction to the alphabet, writing, reading, spelling, poetry, and drama.
- Literature of folk and fairy tales, fables, legends, ancient tales.
- Numbers and the basic mathematical processes of addition, subtraction, multiplication and division.

- Nature stories, house building and gardening.

Middle Grades 4 – 6

- Writing, reading, spelling, grammar, poetry and drama.
- Norse myths, history and stories of ancient civilizations.
- Review of the four basic arithmetic processes, plus fractions, percentages and geometry.
- Local and world geography, comparative zoology, botany and elementary physics.

Upper Grades 7 – 8

- Creative writing, reading, spelling, grammar, poetry and drama.
- Medieval history, Renaissance, world exploration, American history and biography.
- Mathematics, geography, physics, basic chemistry, astronomy, physiology, and meteorology.

Special subjects include:

- Handwork (enhances fine motor skills): knitting, crocheting, sewing, cross stitch, basic weaving, toymaking, and woodworking.
- Music (an essential element for mathematical enhancement): singing, pentatonic flute, recorder, string instruments, wind, brass and percussion instruments.
- Foreign language: Spanish and/or German.
- Art: watercolor, form drawing, beeswax and clay modeling, perspective drawing.
- Movement: eurythmy, gymnastics, group games, and drama.

High School Curriculum 9 – 12

The arts continue to be an integral part of the curriculum throughout High School, incorporated into all the subjects: English, History, Math, Sciences. Art classes (painting, sculpture, drawing, drama) as well as crafts (woodworking, fiber arts, basketry, metal work, jewelry) are offered. Two foreign languages, German and Spanish are offered. Music, choir and instruments, are offered. Physical education includes eurythmy (dance-like movement) games, and sports.

	9th	10th	11th	12th
English	Grammar Composition Vocabulary Speech Literature	Grammar Composition Vocabulary Speech Literature Poetry Term Paper	Grammar Composition Vocabulary Literature	Grammar Composition Vocabulary Literature
Math	Algebra I Probability Statistics	Geometry Surveying	Algebra II Computer Science	Trigonometry Calculus Advance Math

Science	Chemistry Physics Biology Geology	Chemistry Physics Biology Geology	Chemistry Physics Biology Lab	Chemistry Physics Biology
History	U.S. Early World	U.S. 1800's World Ancient	U.S. 20 th Century Roman - Renaissance	U.S. World
Foreign Language	Spanish German	Spanish German	Spanish German	Spanish German
Music	Choir Band/Orchestra	Choir Band/Orchestra	Choir Band/Orchestra	Choir Band/Orchestra
Arts & Crafts	Drawing Woodwork Drama Calligraphy Clay	Drawing Woodwork Drama Painting Clay Block Print Weaving	Life Drawing Woodwork Drama Clay Bookbinding	Metal Work Drama Graphic Design Clay Jewelry
Physical Education	Athletics Eurythmy Games	Athletics Eurythmy Games Health/1st Aid	Athletics Eurythmy	Athletics Eurythmy Games

Philosophy, Theory and Research Base for Vision

At the heart of Rudolf Steiner's pedagogy formulated in 1919 is the conviction that teaching is first and foremost an art and lessons should be presented with an artistic aesthetic. Within that context, the arts are central to learning and the development of the whole child. Core academic subjects such as history, language arts, math and science are integrated with an arts curriculum.

Educational Objectives

The Waldorf objective is to educate the child in a holistic way. And, as a result of that objective everyone involved receives a positive benefit from the program.

Our **curriculum** will:

- Combine the Sciences, Humanities, and the Arts to introduce all important branches of knowledge.
- Develop creative thinking by integrating artistic processes in all subjects:
 - Mathematics progresses from rhythmic recitation in the early years, wherein children discover the qualities of numbers, to the computation of abstract problems in algebra, geometry, and calculus.

- Literature and History give a broad overview of cultures throughout the ages. Children are led from the world of fairy tales in first grade into humanity's earliest stories and myths, through ancient history to modern times
- Geography leads children through their home into the wider world and engenders a feeling of brotherhood and responsibility for community and the earth.
- Science begins with animal stories and nature study, which nurtures a sense of wonder and reverence for life in the early grades. Zoology and Botany in grades four and five build on the students' observations and experience of the world and their curiosity about how animals and plants live and grow. As students become more interested in how things work, optics, acoustics and electricity are explored through experiments beginning in grade six. By eighth grade, students have discovered principles of mineralogy, astronomy, physiology, chemistry and physics.
- Special subjects complement the work of the Class Teacher, presenting each week:
 - Foreign language;
 - Eurythmy – an art of expressive movement;
 - Music – singing, recorder flute, orchestra instruments;
 - Crafts and handwork (e.g. knitting and sewing) are an integral part of the curriculum, developing dexterity, patience, perseverance and imagination;
 - Woodworking, gardening, house building, and other tactile skills give children an understanding of how things are created and a respect for the work of others. These are activities involving the whole child.

Our **teachers** will:

- Value each child's unique talents and needs
- Create a warm, nurturing, safe, and cooperative environment
- Be enriched by the interaction with each child and the class as a whole

Our **students** will:

- Develop a lifelong love of learning through discovery
- Build self-assurance by learning through experience

Our **parents** will:

- Develop a connection between family, development of the child, and education
- Participate in the learning and unfolding of their child

Our **community** will:

- Hold each other accountable for student learning so that no student will fall through the academic crack.
- Be enriched by educational presentations, seasonal festivals and activities and artistic presentations of the children

Interactive dialogue among teachers and between teachers and parents is essential in order to produce the “BEST”. The teacher/child relationship is also crucial and unique. Ideally, teachers stay with their class as it progresses through the grades. This facilitates the development of rapport and mutual respect, and the deep knowledge and bond that develops enhances the teacher’s ability to meet each child’s needs.

How this charter is different from what is available

Curriculum: Waldorf School curriculum has weathered the test of time throughout the world. Rudolf Steiner founded the first Waldorf school in 1919 in Stuttgart, Germany. With a deep insight into children, he understood who they are, how they develop, and why they respond and react. The uniqueness of the curriculum lies in the emphasis on the developmental approach and in how the children are taught. Even though it is founded on ideas first brought forth at the turn of the century, its emphasis on a child development-based curriculum makes it as fresh and meaningful today as it was then. It is one of the fastest growing educational movements worldwide. There are over 800 Waldorf schools throughout the world, including the United States and California. Other types of charters have not benefited from a curriculum that has been tested in place with such proven success as the Waldorf model. Currently, five Waldorf Methods Charter Schools exist in California: Novato, San Diego, Sebastopol, Nevada City, and Ukiah.

Teaching Strategies and Methods: Instruction immerses the child in each subject through presentation, story telling, writing, reading, recitation, drama, painting, drawing, and movement. . This is central to the teaching strategy since it promotes and develops active listening, imagination, memory and vocabulary. Teacher’s storytelling and children’s retelling builds comprehension of story structure. Writing is taught before reading and is first experienced through pictures, drawing and movement. Nature stories told and retold in the early grades evolve into more advanced scientific investigations of zoology, geology, astronomy, botany, chemistry, physics, physiology, and anatomy. Within a structured curriculum, main lesson books and projects of the child’s own creation replace most traditional textbooks. Each student will create an ongoing record of their work and the learning experience of the main lesson through the composition and illustration of a main lesson book. These become a treasured record of the child’s progress and workmanship. Particular attention is paid to the rhythm of the day, season, and year. Teachers devise schedules and lesson plans that best reflect the way children learn at different developmental stages.

Waldorf schools instruct additionally through form drawing; nature observation and drawing; watercolor instruction; handwork (knitting, crocheting, woodworking), and music. The teachers present an arts-based, integrated curriculum that recognizes the development of the whole child. This attention to the whole child demands integration of music, art, handwork and movement into the academic curriculum.

One central strategy of Waldorf Education through the 7th or 8th year, is that no grades are assigned to student work. Instead, narrative evaluations gauge the progress of the whole child within the context of all of the child's accomplishments. Waldorf Education stresses excellence, not perfection or adherence to a particular standard, but excellence for each child according to his gifts and capabilities. Each child is acknowledged for his individual contribution and his personal best. However assessment and evaluation of student work is an important part of our program.

II. Grant Project Goals and Activities for Approval of a Charter Proposal

A. Grant Project Goals and Objectives

Tangible work product at the end of the project.

By the end of this planning phase for our charter school, we will have produced the following tangible work products:

- Completed and begun implementation of a business plan for the NVWSI.
- Developed a five year combined business plan for the NVWSI and charter school.
- Obtained input and approval from the Napa Valley Unified School District Board of Education for the proposed charter school.
- Laid the foundation for meeting the 14 point criteria of the charter school law.
- Researched and identified an appropriate site to house the proposed charter school.
- Researched and interviewed qualified instructors and an administrator for the proposed charter school.

With the above work products in place, we will be ready to open our kindergarten and first grade classes in fall 2000.

Individuals responsible for completion of work

Individuals responsible for the completion of this work include, but are not limited to the NVWSI, herein after referred to as NVWSI Team: Wil Anderson, President, Dr. Judith Caldwell, Vice-President, Becky McIver, Treasurer, Pam Reeves, Secretary, Catherine Schlesinger, Teacher, Martin Armstrong, Parent, and Petra Hauptman, Parent.

B. Identification of Planning Needs for the Development of an Effective School

1. Educational Capacity

Motivated by the desire to develop a Waldorf Methods Charter School, our team members are familiar with and firmly grounded in Waldorf School theory and practice. Although the Waldorf approach has had over eighty years of testing and cultivation and has proven to be effective in countries around the world, in the public school system the approach is innovative. Furthermore, our team is aware that every educational theory and practice warrants ongoing examination and improvement. In fact, one of the challenges identified by Rudolf Steiner was "to recognize that each

generation has its own character and that the schools must be kept relevant to changing times and circumstances.”

Thus far, we have been reviewing literature related to Charter schools; the importance and role of an educational vision that is clear, compelling and connected to teaching and learning; the current challenges in the education of young children in California; theories and practices related to holistic education; theories and practices related to school restructuring and school reform; the special educational needs of underachieving students and children with special needs; student assessment (including the STAR Program and Ed Code Section 60605) and other measurements of student performance; encouraging parent involvement among parents from various cultures; models of ongoing professional development for staff in the five existing Waldorf Methods Charter Schools. Our team will continue to explore all of these topics, and to educate themselves and the community. Research on the internet is an ongoing process – articles and other information are identified and shared among the team and other interested parties on an ongoing basis.

In addition, the committee has contacted and/or reviewed information from the Waldorf Methods Charter Schools in Nevada City (Yuba River Charter School), Sebastopol, Novato, Sacramento, and San Diego (the Harriet Tubman School). We are in close contact with Mr. George Hoffer, Administrator of the Yuba River Charter School and Ms. Rachel Bishop of the Novato Charter School. Both provide assistance as needed. In February, the NVWSI Team sponsored a forum for interested parents and school officials with Ms. Bishop as a presenter.

Clear and measurable outcomes for student performance

- Main lesson books created by the students themselves;
- Completed handwork, projects such as creating a garden, compost pile, woodwork, paintings, modeling etc.;
- Written and oral evaluations by teacher;
- Teacher/parent meetings, interactive dialogue.

Using materials developed by the State Department of Education and other Waldorf Method Charter Schools, the NVWSI Team will work with the NVUSD and other Waldorf method educators to develop specific Student Competencies and Assessment tools. Currently, the Waldorf Method Charter School of San Diego, Novato and the Yuba River Charter Schools are developing measurement tools. A great deal of work has been accomplished by the Yuba River Charter School in the development of Language Arts Student Competencies. This work includes the development of assessment tools for each grade level.

The NVWSI Team will also examine the process of adapting the grade-by-grade student competencies included in the Charter of the Waldorf Charter School of San Diego.

These competencies follow the Waldorf-recommended curriculum for each grade and are based upon Rudolph Steiner’s insights into children and his theories regarding the developmental stages of learning. As the specific curricula for Ukiah Valley Charter School is developed, our team will continue to examine these competencies, tailoring them to the specifics of the curricula and the specific needs of the proposed student population. The page limitations for this grant proposal do not allow space to list all of these competencies. A sample is provided below for a portion of the first grade curriculum.

English Language:		
Reading: Children will achieve mastery of all Reading Readiness skills e.g. auditory and visual letter recognition.	Writing: Children will be able to correctly form all letters and compose pieces of sound/symbol writing. Children will be able to read what they write.	Speech: Children will understand linguistically how the mouth is formed to produce vowels, consonants and words. They will be able to memorize and recite 20 line poems.
Arithmetic:		
Counting: The children will be able to count past 100.	Four Processes (+, -, x, ÷): The children will have worked with all four processes (with numbers up to 24) in relation to objects. They will draw pictures and numbers in their main lesson books using the processes. In multiplication, they will use single digit multipliers, involving sums no greater than 24.	They will recite 2, 3, 5 and 10 tables in order by rote. They will recognize odd and even numbers up to 24. They will be able to do mental arithmetic using number stories and mental pictures. They will be able to draw and recognize circles, squares, and triangles.
Music:		Drawing:
Instrumental: The children will be able to play simple tunes on the pentatonic flute by watching the teacher’s fingering. They will be able to play four songs by memory.	Singing: The children will be able to match the correct notes while being led by the teacher.	Color Theory: The children will be able to fill a page with flat shading using crayons.

Traditionally, the Waldorf approach does not use tests for young children. Student progress is assessed through student work and portfolios. Included in these portfolios

are a sample of the child's main lesson books, various practice papers and pieces of art. Students are also evaluated against the above-listed measurable competencies by reviews of their work, both written and oral. A record of each child's development is kept by the teacher. Parent conferences are scheduled during both the first and second semesters to keep parents informed about student progress, and to enlist their help should problems occur. At the end of each year, an extensive student report is prepared and given to the parents. The report includes an overview of the year, stating what was taught during each learning block, enumeration of subjects adequately completed, the results of performance assessments, identification of areas needing additional focus, and descriptions of the child's attitudes, study habits and social interactions.

Comprehensive student assessment program aligned with the school's educational mission and student outcomes

A full plan for measuring student achievement will be developed. This plan will include procedures for integrating the State-Standardized Testing and Reporting (STAR) system into the traditional Waldorf process for assessing student achievement, policies and procedures for ensuring compliance with Cal Ed. Code Section 60605 and a description of the method to be used for examining and possibly modifying the educational program and teaching practices to ensure student success in accordance with these State-prescribed measures. In an ongoing and continuous way, we will align multiple assessment measures with our outcomes and state standards and curriculum and instruction.

Address professional development tailored for school reform and restructuring

The Waldorf approach includes structures for ongoing professional staff development. Each school includes a "College of Teachers" which is charged with ensuring the educational excellence of the program, including planning for ongoing study and in-service training. Through the planning process for the educational program for the Napa Valley Charter School, goals will be established to address ongoing professional development related to school reform and restructuring, with the College of Teachers identified as the structure for implementation of those goals.

- Recruit, sustain, and develop quality staff dedicated to nurturing the development of each individual child;
- Research and offer workshops which are pertinent to the school's philosophy and teachers;
- Continue with study groups and other forms of outreach for parents, community and teachers;
- Attend professional Conferences as needed.

Resources to be used for the above

- Study research and review other Waldorf Method Charter Schools as mentioned throughout this document.

- We will continue to work extensively with the NVCUSD, specifically with Courtney Henderson, K-6 Curriculum Director.

2. Business and Organizational Management Capacity of the School

Comprehensive design for effective school functioning which supports educational vision

The NVUSD, the kindergarten and first grade teachers, and the NVWSI team will work together during the first two years of operation to oversee and implement the proposed charter school. This team will ensure that the business and organizational management practices achieve the highest standards of academic and business practices. This team will be responsible for the following:

- Create and implement a business plan for the proposed charter school for a one year period and a five year period.
- Work with the school district and provide parent and community outreach.
- Address the 14 requirements of the charter school law including: the educational program, student outcomes and progress, governance structure, employee qualifications, health and safety procedures for students and staff, admission requirement, racial and ethnic balance, annual audit requirements, procedures for suspension or expulsion, staff benefits, public school attendance alternatives, and the rights of school district employees leaving for or returning from charter school employment and procedures for dispute resolution.

This team will be responsible for establishing and monitoring policies to further the charter school mission. They will ratify all staffing recommendations, review and approve budget and facility plans, develop relationships in the community and acquire resources. A business manager will be brought on board as the school grows.

Activities to develop a proposed budget that would demonstrate the fiscal viability of the school

The NVWSI will create a finance committee that will:

- Form a budget sub-committee for the proposed charter school that will be responsible for developing the proposed budget and ensuring that the budget adheres to all state requirements. Expenditures would include but not be limited to: staff salaries and benefits, school supplies, services and other operating expenses, facilities and capital outlay.
- Research and review the services available at the District level and consider utilizing their support programs and services (payroll insurance, facilities maintenance etc.)
- Research categorical funds we may be eligible for e.g. Class Size Reduction, Special Education, Federal Title I, II, IV and VI and any other one-time monies allocated by the state.
- Research grant opportunities.
- Receive “fair share” funding from state for each student enrolled in our charter school who meet all eligibility requirements.

- Research and review appropriate publications which might apply to developing a budget, such as *How Much Funding Should Charter Schools Receive?: Making Charters Work*, *Strategies for Charter School Developers*, a policy briefing released by The Charter Schools Project; *Financial Implications of Charter Schools*, a compendium of financial information for charter developers put together by the California Association of School Business Officers
- Utilize standard fiscal practices.

Development of governance and management structures

The primary goal of our Governance Team will be to ensure academic excellence. The first two years, the kindergarten and first grade teachers, in cooperation with the NVWSI will work closely together in a business manager capacity to ensure all governance including business and organizational management practices achieve the highest standards. Ongoing responsibilities include continuously monitoring our school's educational program, and student learning. We will be sure that all who encompass our community are continuously aware and informed of all progress.

Create a subcommittee to ensure an effective Governance Team is established. This team will consult with experienced charter school developers, review appropriate publications that address organizational development, structures and process matters; oversee the final draft of the governance structure for the charter petition.

A non-profit organization, NVWSI, has been established to govern the charter school. Board members consist of community leaders, parents and a teacher. This organization will continue to encourage the support and participation of interested community representatives from education, business, legal, and environmental fields.

Location of and plans for the maintenance of school facilities

- Work with the site development committee of the NVWSI and the Napa Valley Unified School District to procure a centrally located site in the Napa Valley;
- Research the possibility of a contract for maintenance services of the proposed charter school with the NVUSD;
- Research and ensure all state regulations are met for the physical standards of the site as well as those requirements set in the Americans with Disabilities Act. A plan will be formulated to ensure safety by delineating fire, disaster, and emergency procedures.

Resources to be used for the above

- Research and review with business managers and finance managers of other Waldorf Methods Charter Schools.
- Work with the Napa Valley Unified School District to ensure we are in compliance with all appropriate rules and regulations governing a charter school.
- Utilize state agencies and publications for standards and enforcement information.

3. Collaboration and Networking Strategies

Involvement of parents and community members in the development of the charter proposal

A community outreach committee has been established to ensure parents and the community are involved in the charter school process. The NVWSI Team is currently expanding membership to represent more of a cross-section of the local community (including teachers, parents, business people, people from various cultures and economic backgrounds).

- Parents and the community will be asked to share their goals for a Waldorf Methods Charter School through the special Charter School committee.
- Parents will be asked to support the proposed charter school's educational program.
- Forums for educating and integrating parents and teachers and administrative staff will be scheduled, and will be open to the community at large.

Collective knowledge and experience of developers and/or operators

Our team and resources have far reaching areas of expertise. This includes early childhood education, curriculum development, marketing, profit coordination, staff development, extensive teaching, research, publishing experience and direct parental involvement with other Waldorf schools. Two team members have government experience with a total of nine years in local government.

External means of technical support

- Research the state and private California Association of Network Educational Charters (CANEC) resources available for assisting charter school developers.
- Utilize existing charter and Waldorf school officials as consultants.
- Build strong partnerships with parents, community, district officials and other charter schools.
- Research successful consultants in the field.

Plans for building partnerships and networking systems with the charter school

The NVWSI Team has already developed collaborative working relationships with staff from the California Department of Education, the Superintendent and staff of the NVUSD, various members of the NVUSD Board of Education, other Charter Schools (particularly the other Waldorf Method Charter Schools), and the staff of CANEC. Also, the Administrator of the Yuba River Charter School is providing assistance as needed. We believe that it is through these types of strong, ongoing connections that success and healthy schools are maintained.

4. Program Evaluation

A comprehensive program assessment structure

The NVWSI will develop an assessment structure that will incorporate many measurement factors in a subjective framework. Tools used will include attendance records, disciplinary data, main lesson books, and examples of class work and projects.

The criteria will be based on the goal of enabling a child to

- Be literate;
- Have adequate to superior communication skills;
- Be able to think creatively and logically; be knowledgeable of cause and effect;
- Be able to gather and organize information;
- Concentrate and be self-motivated; cooperate with others;
- Be adaptable and flexible;
- Exercise responsibility and confidence;

This structure for assessment will be demonstrated by student progress, parent satisfaction, teacher approval and will ultimately determine the school's fiscal success.

Outline of measurements used to evaluate success of the charter school's program

- Align multiple assessment measures with outcomes, state standards, curriculum, and instruction on an ongoing basis.
- Measure success of the academic program during the first five years. Identify progress and areas for improvement.
- Determine if the school is a viable organization financially solvent and stable, enrollment is stable and near capacity, school governance is sound and professional staff are competent and resourceful.
- Financial reporting, yearly audit, evaluation.

Review student assessments to help monitor the success of the educational program. The Napa Valley Waldorf Methods Charter School will be held accountable for educating students successfully, but in a different manner than conventional schools. To that end, we will develop the **best** assessment plans possible, simply because we believe that all students deserve individual attention which indicates the use of an all inclusive assessment plan. Our evaluation techniques will continually evolve, but our basic assessment portfolio will include required standardized testing, and other authentic performance-based assessments that are appropriate to a Waldorf Methods Charter School.

Ensure compliance with the terms of the school's charter.

C. Support for Getting Charter Petition Circulated and Approved

1. Specific Activities and Work to Be Done

- Continue to schedule forums about Waldorf Education to inform the community and secure a foundation of families.
- Develop a charter proposal.
- Continue to develop relationships with the NVUSD and gain their respect and confidence.

- Help the NVUSD understand the value of a Waldorf Methods Charter School in their district.

2. Justification for Use of Grant Funds

- Research appropriate assessment tools and align them with state standards, curriculum, and instructional practice.
- Acquire professional and consultant expertise needed to research and successfully design the five year education and business plan and to fully develop the charter petition and associated documents.
- Utilize funds to support nine working committees:
 1. Strategic Planning: business plan, charter budget, finance, and public relations;
 2. Directing/Teaching: staff development, parent education, teacher/parent;
 3. Outreach: community, other charters, local officials, maintain interactive dialogue through collaborative networking;
 4. Hiring Personnel;
 5. Enrollment and Site Development;
 6. Charter School;
 7. Major Funds and Grants;
 8. Fund raising;
 9. Assessment/Evaluation.
- Provide continued administrative support e.g. typing, copying, phone, internet/e-mail, answering machine, fax machine. Purchase materials and literature.
- Attend conferences; membership dues.
- Insurance.

(Appendix F, Budget Sheet and Narrative will detail how grant funds will be spent and administered.)

III. Self-Assessment and Procedures for Monitoring Proposal

Evaluation of the quality of the charter proposal itself

The NVWSI will continue to work with the community, professionals, and consultants to oversee the development of a charter school petition. This team will identify objectives, responsibilities, documentation and scheduling to ensure that a quality proposal is created. Our group, working in partnership with the NVUSD, will have primary responsibility for monitoring progress toward completion of the charter proposal and of all the activities described in this proposal.

The 14 required charter elements, once fully developed, will be submitted for review to a mentor charter school by the NVWSI and by our governance committee. Upon review, the charter school petition will be taken to the NVUSD Board of Trustees.

Timeline for completion of specific tasks

Napa Valley Waldorf Method Charter School – Planning Grant Timeline

Activity	Completion Date
1. Recruit members from parent group, NVUSD, and community at large into NVWSI.	Ongoing
2. Draft a detailed design for 18 month planning period.	August, 1999
3. Create partnerships between charter school and community groups, agencies, and organizations.	Ongoing
4. Draft ground rules and dispute resolution process for 18 month planning period.	August, 1999
Activities Below Assume Grant Funding begins May, 1999	
5. Develop final detailed design plan for overall project and for each committee.	September, 1999
6. Formalize an advisory board to the NVWSI.	September, 1999
7. Create a draft school budget.	October, 1999
8. Identify and recommend curricula and educational program.	November, 1999
9. Locate school site for kindergarten and first grade.	Ongoing
10. Identify and recommend specific measurable student outcomes.	January, 2000
11. Develop administrative structure including budget and monitoring and accounting system.	January, 2000
12. Identify and recommend a plan for student assessment.	March, 2000
13. Develop a legal governance for the school.	March, 2000
14. Develop guidelines for staff and student policies and health and safety procedures; achieve student diversity.	March, 2000
15. Create plan for staff development.	Ongoing
16. Interview candidates for kindergarten and first grade teachers.	March – May, 2000
17. Design system for regular comprehensive assessment of charter school.	April, 2000
18. Design a plan for charter petition circulation and approval.	May, 2000
19. Present completed draft of charter petition to NVUSD Superintendent and his board for comment.	June, 2000

Procedure for evaluating quality of work

Each person or committee assigned a task in the charter school petition will work closely with the NVWSI to ensure projects remain on schedule and are reviewed by appropriate professionals and consultants.

Adherence to required evaluations of the grant

A select person will ensure planning meetings are conducted and deadlines are being met according to the timeline. If needed, this person will ensure additional support is provided.

Process for how the grant money will be spent

The NVWSI will act as financial administrator of the grant. The finance committee will oversee the record keeping to include expenditures and their approvals, review invoices for payment, purchases and expenses, and provide monthly budget reports.

****REVISED * BUDGET NARRATIVE***

The NVWSI plans to procure \$1 million over the next four years to support a Waldorf-inspired charter school, beginning with a kindergarten and first grade in September, 2000. [Note: A grade will be added each year thereafter.]

The NVWSI is currently developing a business plan in which the board will obtain and distribute \$250,000 annually over a four-year period – for start-up and regular school expenses. We are in the process of identifying what funds are needed and when. We will identify resources for grant money and underwriters. Our initial goal is to acquire approximately \$150,000 from a variety of grants and approximately \$40,000 from underwriters.

The fundraising committee is planning two major fund raising events during the next year to raise approximately \$40,000. Our goal is to establish each event as an annual fund raiser campaign. Another \$20,000 is expected by creating an annual Giving Campaign, where we solicit funds from parents, grandparents, and friends of Waldorf Education.

Series 1000 and 2000 will be utilized to help recruit teachers and clerical staff. The NVWSI will place advertisements in appropriately researched educational publications, make exploratory and follow-up phone calls, and attend educational job recruitment fairs.

Series 3000 will not be utilized at this time. It is felt that the benefit packages from the sponsoring school district will provide The Napa Valley Charter School with a strong package.

Series 4000 will provide the necessary “office equipment” to ensure open communication channels are available to the community, the sponsoring school district, and the NVWSI. This funding will also be used to purchase appropriate books and materials for research in order to open a well grounded and financially stable Waldorf Method Charter School.

Series 5000 will allow for a multitude of services for the NVWSI. We have been fortunate to secure a pro bono legal advisor who is well versed in the charter school law and establishing a charter school. The NVWSI will need to contract the services of a financial advisor in order to ensure that the charter school will be on sound fiscal footing. The NVWSI will also rely on the legal expertise to provide fiscal guidelines.

Funding will be utilized by the following committees to support this planning grant and implement a Waldorf Method Charter School by September 2000.

- **Strategic Planning**, Martin Armstrong and Becky McIver, Co-Chairs. This committee will establish future direction and monitor progress toward the goals of the mission statement. This committee includes three sub-committees:
 1. *Charter School Budget* – Work closely with the business manager of the charter school to establish yearly operating budgets and ensure operating budgets are implemented correctly. Ensure necessary reporting documents are in place and are utilized correctly.
 2. *Management, Business Plan, Marketing* - This team will be responsible for implementing and maintaining a current business plan, developing the school name and brand identity.
 3. *Finance* - Work with CPA, auditor, and Committee chairs to prepare initial budget and then annual budgets thereafter and create financial reports/forms needed by the Board.
- **Directing/Teaching**, Wil Anderson and Pam Reeves, Co-Chairs. This committee includes three sub-committees:
 1. *Staff Development* – Maintain a budget in order to promote staff development in the form of lectures, workshops, retreats.
 2. *Parent Education* – Sponsor lectures, talks, workshops, study groups, or classes to further the understanding of Waldorf Education.
 3. *Teacher/Parent* –Establish teacher/parent conferences, committees to help with school and/or class festivals.
- **Outreach**, Judith Caldwell, Chairperson. Make the mission of the Board known to the community at large, and generate interest in the idea of Waldorf Education in general. Answer concerns and questions of the general public and the current Waldorf community. This committee includes three sub-committees:
 1. *Community* - Establish town meetings/forums to continue to inform the public about the NVWSI and the Waldorf inspired charter school.
 2. *Other Charters* – Develop relationships with other Waldorf inspired charter schools. Share knowledge.
 3. *Local Officials* – Continue strong, positive relationships with local school board, and other community officials.
- **Hiring/Personnel**, Wil Anderson and Petra Anderson, Chairperson. This committee will be responsible for establishing parameters, identifying, interviewing, and hiring

qualified teachers, Waldorf and California certified, as well as terminating personnel. This committee will also respond to personnel issues/concerns.

- **Enrollment and Site Development**, Petra Anderson, Chairperson. This committee will be responsible for identifying the needs of a growing Waldorf School, maintaining appropriate classroom size, and finding an appropriate location.
- **Charter School Committee**, Judith Caldwell, Chairperson. This committee will be responsible for researching, meeting any and all requirements, applying for charter status, maintaining all aspects of the “approved” charter etc. This committee will also be responsible for three phases: planning, implementation, and monitoring.
- **Major Funds and Grants Committee**, Martin Armstrong, Chairperson. This committee will be responsible for identifying and applying for appropriate major funds and grants. Responsibilities will also include working with the Finance team to ensure proper management and reporting of the funds.
- **Fund raising Committee**, Becky McIver, Chairperson. This committee is responsible for identifying one or two major fundraisers to implement throughout the year. Generate needed money to carry out the mission of the group. The Annual Giving Campaign will also be a function of this committee.
- **Assessment/Evaluation Committee**, Wil Anderson and Judith Caldwell, Co-Chairs. This committee will work with other Waldorf Method Charter Schools to research and create acceptable methods of assessing and evaluating student progress and development which satisfy state requirements.

Series 5000 will also allow the NVWSI to send representative(s) to the annual CANEC conference, other Waldorf Method Charter Schools, and the sponsoring school district; create and facilitate a team building conference; apply for specific memberships to other organizations to further educate the community on Waldorf Education; conduct educational nights, workshops, forums, and round table discussions.